

Assessing Fees

Fees may include a lab charge for students enrolled in certain courses, a uniform charge for athletes and band members, or a participation fee for field trips.

Create Categories and Types

Before assessing fees, users must first establish fee categories and fee types. A fee category is a broad classification and is set up at the district level. The default fee categories in PowerSchool are School and Course. Fee categories can contain many specific fee types, which can be created at the school level. For example, there might be a fee category for sports at the district level and then fee types for baseball, football, and soccer at the school level.

Navigation: Start Page > District Setup > Fee Categories

1. Click **New** > enter the title of the category > **Submit**
2. Choose a specific school
3. Click **School** > **Fee Types** > **New**
4. Enter a fee type
5. For **Fee Category**, choose the appropriate category
6. Enter a fee type description
7. Click **Submit**

Note: On the **Fee Types** page, use the **Priority** field to prioritize payments when using the distribute tool (See Fee payment/distribution below). The lower the number, the higher the priority. Fees with higher priority get paid first.

School and Course Fees

These fees can be automatically assessed to students upon enrollment in school or an assigned course.

Navigation: District > Schools/School Info > School Fee Information > New

1. Fee types for these categories should be created at the school level following the steps above
2. On the New screen, leave the **department** field blank
3. Enter the **amount**
4. Enter **description**
5. Do not check **Pro Ratable** as school fees typically must be paid in full
6. **Course Fees** are setup at the school level within the actual course found at SCHOOL>Courses>click a course>Fees tab>New

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7. Enter the applicable information with the **Date** being the day the fee should be applied, defaults to today's date
8. **Pro Ratable:** Select the checkbox to indicate that the fee is to be assessed based on the number of days within the term for the course section. If a student enrolls in the course after the start date or drops the course before the end date, the student will only be charged for that portion of the course

Note: Exemption of school or course fees can take place at either the school level or the District level. Student exemptions on an individual basis can be found on the **Other Information** student page. To exempt all students from certain fees, go to the School info found at District level and select the exemptions. This will still allow fees to be assessed manually if necessary.

Student Fees

To manually assess a student fee, first search for and select a student, and then click **Fee Transactions**.

1. From the Create New Fee menu, choose the appropriate fee type
2. Choose a department
3. Enter a description
4. Enter the amount of the fee, and then click Submit

Important: Be sure the information entered is accurate, as there is no edit or delete function for student fees (to preserve the history of the transaction). If you inadvertently make a mistake, you will have to create a transaction using payment, credit, or void to reverse the effect.

Fee Payment/Distributions

Making a payment on one fee type:

1. Locate the fee and click on **PAYMENT** in the **Transaction** column
2. **Transaction For:** populates automatically based on the fee type
3. Course will only appear if there was a course associated to the fee type
4. **Transaction Date:** defaults to today's date
5. **Transaction type:** choose payment, credit or void
6. **Description:** explanation of the transaction
7. **Amount:** if VOID is selected no amount is necessary. If the payment is higher than the balance the payment will be rejected
8. Select a **payment method** from dropdown
9. **Payment reference number** can be used to record check number, etc.

Making a distribution payment to all outstanding fees by priority:

1. Click Distribute in the Transaction column on the Fees Transactions page
2. Enter the date, Description, amount, payment method and reference number.
3. Payment will go to all fees based on payment priority

Fee Functions

Fees can be assessed for an individual student or a group of students with **Fee Functions**. Search for and select a group of students, and then choose **Fee Functions** from the **Group Functions** menu. On the **Fee Functions** page, you can create transactions, assess school and course enrollment fees, and clear current balances.

Each time you perform a group fee function, PowerSchool generates a group transaction ID. You can use the group transaction ID to perform additional actions, such as reversing fee assessments or transactions. This is found on the student Fee Transaction page.

Searching Fees

From the **Start Page**, enter a formula from below in the text box to obtain the needed results.

<u>Formula</u>	<u>Results</u>
*fee.fee_balance=partial	Students who have at least one fee balance that is partially paid
*fee.fee_balance>0	Students who have at least one fee balance
*fee_balance.balance>0	Students with a fee balance greater than zero
*fee_balance.balance=0	Students with a fee balance equal to zero
*fee_balance.balance=null	Students with no fee_balance record and a zero fee balance
*fee.id=noschool	Students who are not related to a school fee record
*fee.id=nocourse	Students who are not related to a course fee record

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